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ABSTRACT

In recognition of the need for a coordinated faculty and staff development program within the South Carolina Technical Education System, a task force was appointed to recommend a program covering the various areas of in-service faculty and staff development. This manual, based on the task force's recommendations, contains theoretical guidelines and practical procedures for a continuing development program intended to meet the identified needs of individuals and/or institutions. The ultimate end of the program is improvement of the quality of educational services provided to students enrolled in the various institutions comprising the system. Included in this manual are policies defining faculty and staff development, its purposes and participants; guidelines and procedures for institutions in the areas of program design, program activities, evaluation, planning and budgeting, and administrative and operational guidelines; guidelines and procedures for the system central office; and definition of and guidelines for operation of the educational leave plan. Appendices contain program proposal and reporting documents, a glossary of faculty and staff development terms, and a checklist for assessing institutional professional development needs or for conducting individual self-evaluations. (JDS)

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FACULTY AND STAFF DEVELOPMENT MANUAL

FOR

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

STATE BOARD FOR TECHNICAL AND COMPREHENSIVE EDUCATION

JULY 1, 1975

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FACULTY AND STAFF DEVELOPMENT PROGRAM

INTRODUCTION

Since the establishment of the South Carolina Technical Education System in 1961, in-service faculty and staff development has been in operation, varying in emphasis among the institutions. In recognition of a TEC-wide need for a coordinated program for faculty and staff development, Dr. Charles E. Palmer as Executive Director of the State Board for Technical and Comprehensive Education appointed in 1974 a Task Force on Faculty and Staff Development. The task force delivered its report on July 11, 1974, recommending a program covering the various areas of in-service faculty and staff development for the State TEC System. In anticipation of the establishment of the program, in August, 1974, the executive director appointed Dr. Oscar W. Lever as Director of Faculty and Staff Development to work within the Division of Educational Services with responsibility for the development of policy and guidelines for the program within the State TEC System.

The philosophy and state-wide goals of the South Carolina Technical Education System require an in-service development program that will help each employee to actualize to the maximum his/her potential. It is essential, therefore, that the system establish both theoretical guidelines and practical procedures for a continuing development program that will enable each employee and each institution to meet identified needs of the individual and/or the institution. The ultimate and perdurable aim of a viable faculty and staff development program is to improve the quality and effectiveness of educational services provided the students of the institution. Thus a conceptualized development program is the starting point for all who want to move toward the goals that they have envisioned - goals envisioned for themselves and for the institutions and the students they serve.

The concept of personal development has never been easy to describe or define. Perhaps personal development is most accurately described not as a state of being but as a process of becoming. The concept of development closely parallels the concept of education - the self-activity of the individual in the continual remaking of himself, under motivation and under guidance. If this concept is accepted, how might a faculty and staff development (FSD) program be designed and implemented to meet the specific development needs of the State TEC System? It is to this question that the components of this document are addressed.

POLICY GOVERNING FACULTY AND STAFF DEVELOPMENT

On January 15, 1975, the State Board for Technical and Comprehensive Education adopted a policy to encourage and support financially a program of in-service education and training for the professional development of faculty and staff of the South Carolina Technical Education System. The policy follows.

1. Definition of Faculty and Staff Development

(1) Purpose. The program for development of faculty and staff has a two-fold purpose: first, to provide those activities designed to improve each employee's knowledge, skills, and proficiency in his/her present position and to prepare him/her for opportunities for advancement within areas of service of the State TEC system; and, second, to provide the faculty and staff with opportunities to develop new and/or upgraded professional and personal competencies to fulfill the TEC system's commitment to meet educational, occupational, and cultural needs of the variety of students as they prepare for occupational and citizenship responsibilities.

(2) Participants. Faculty and staff are terms interpreted to include teaching faculty, administrators, and other noninstructional employees such as clerical, maintenance, janitorial, and auxiliary personnel. Each full-time employee of the State TEC System, classified or nonclassified, without regard to sex, age, religion, race, color, or national origin, may participate in the program, subject only to restrictions inherent in specific activities.

2. Responsibility for Administering and Budgeting

(1) Responsibility. Subject to the approval of the State Board for Technical and Comprehensive Education, the executive director or his designee shall be responsible for developing guidelines and regulations for the establishment, administration, and budgeting of the faculty and staff development program for the State TEC System and the institutions and subdivisions therein.

(2) Program Proposals and Reports. The proposal for a program of faculty and staff development shall be submitted to the executive director on program proposal forms on which are outlined the specific activities for the year with a budget summary of estimated revenue and expenditures of development funds. After appropriate consideration of the proposal, the executive director shall issue a letter indicating the action taken on the proposal. At times designated, evaluation and status reports of approved programs shall be made to the executive director. The proposal documents and the evaluation and status reports shall be bases for faculty and staff development program accountability.

The staff development program for the employees of the Central Office of the South Carolina Technical Education System shall follow the same guidelines and procedures in effect for the institutions within the State TEC System.

3. Funding for Faculty and Staff Development Program

The Code of Laws of South Carolina grants authority to departments, bureaus, agencies of State Government and counties, municipalities, school districts, and other governmental units to appropriate and expend public funds for in-service training for employees of the state. By statute, therefore, the State TEC System is granted authority to accomplish this purpose through activities and funding of a faculty and staff development program.

(1) Funds in Unitary Operating Budget. Each institution of the State TEC System in its unitary budget and plan of operations shall allocate funds for a program of faculty and staff development. To augment and support this allocation, the State Board for Technical and Comprehensive Education shall incorporate within the system budget request to the State Budget and Control Board adequate funds for faculty and staff development for the State TEC System. A supplementary allocation of state funds shall be made to the institutions on a matching-funds "dollar for dollar" basis whereby the institutions will receive a supplemental allocation of state funds equal to the amount allocated to faculty and staff development by the institutions from normal revenue sources.

The State Board shall allocate funds in the budget plan for the Central Office of the State TEC System for a staff development program for employees of the central office.

(2) Gifts and Grants. Funds designated for the purposes of faculty and staff development received through governmental agencies, grants from foundations, and gifts from individuals, businesses, or industries, shall be included in the faculty and staff development proposal budget but such funds shall not be considered in the determination of the supplemental allocation of matching funds.

(3) Funds Accountability. All revenue, appropriations, gifts, and grants, which are designated for faculty and staff development shall be accounted for in the program proposal and budget, and in the evaluation and status reports. All expenditures, including travel, supplies, educational leave, salaries reimbursement of tuition, honoraria, etc., shall be accounted for in relation to specific development program activities and in the budget summary.

(4) Restrictions. The faculty and staff development program for the State Technical Education System shall be in conformity with the Code of Laws of South Carolina, and compatible with the State Budget and Control Board policies which are applicable to the South Carolina Technical Education System as an agency of the South Carolina State Government.

Funds committed for the faculty and staff development program shall be expended only for activities which are clearly identifiable and reasonable under the approved development plan. The program shall be operated on a fiscal year basis under a clearly identified budget of funds available and committed. The budget shall be prepared and administered in conformity with the fiscal policies and procedures of the State TEC System.

(5) Limitation of Funds. The availability of funds at the institutional and/or state level shall be the ultimate criterion for design of the faculty and staff development program and selection of components thereof, and for commitments to institutions and/or individuals for activities conducted thereunder.

GUIDELINES AND PROCEDURES GOVERNING FACULTY AND STAFF DEVELOPMENT

The Guidelines and Procedures Governing Faculty and Staff In-service Development are divided into four sections:

I. Design for Faculty and Staff Development
II. In-service Development Activities
III. Planning and Budgeting Procedures
IV. Participation in Faculty and Staff Development

I. Design for Faculty and Staff Development

The design for a successful FSD program should be predicated upon the prime consideration that faculty and staff development should be a normal, continuous, integral part of the State TEC System. Each employee should concur with over-all goals and objectives of the State TEC System and develop for himself/herself a continuous personalized plan for his/her development with identified objectives and strategies - a program tailored to his/her needs and his/her potential. The FSD design of the institution should carry those components which offer opportunities in time for this personalized development which concomitantly will prepare the institution for greater efficiency and effectiveness.

The following matters appear as mandatory for designing and administering a FSD program: goals, priorities, strategies, evaluations.

1. Goals

Goals, as here understood, refer to the long-range accomplishments which are envisioned for the faculty and staff of the institution as it operates within its areas of community and state-wide responsibility. These goals should be defined in relation to needs and/or problems which are identified and described under a faculty and staff needs assessment survey. Candor, clarity, and comprehensiveness are essential characteristics of goal description. In everyday terms, goals have to do with what the faculty and staff have yet to learn how to do better before they can do their jobs as they ought to be done. It is therefore important that goals be described in terms of what is to be gained by reaching them. A poorly described goal can nullify the best intentions and the best efforts.

It is appropriate and important that goals be defined in general terms under which concrete, measureable, objectives are subsumed. Examples of goals are as follows: to provide updating on technical processes in industry; to provide needed professional skills; to provide an associate degree for certain faculty and staff; etc. The total FSD program should be sufficiently comprehensive to include in time all personnel in one or more of its components. The program also can and should include activities covering various degrees of personal competence and status, and various areas of innovative and conventional education and training.

Sometimes a project such as FSD can bog down or fail because the planners decided on the wrong goals. The next step, therefore, is to consider the choice of priorities.

2. Priorities

After the range of goals has been described and the rationale that supports the validity, the relevance, and the feasibility of each is laid out, the next step is to choose those goals which have priority. This process is to some extent an effort to establish a hierarchy of goals based on a hierarchy of needs. There should be an intense effort to choose primary issues, and to concentrate on basic relationships. Assumptions, data research evidence, logic, hypotheses, and, above all, "the best judgment of sensible men", should be laid out to support the choices.

The local institution should choose goals with the greatest potential for that institution at the time. This principle recognizes institutional experience, educational climate, and unique educational purposes for the students and the community. This principle allows "system-thinking". The choice of goals cannot be rightly considered in isolation from organizational arrangements, curricula, salaries, incentives, and morale. Hence, the choice of priorities will demonstrate that these factors have been taken into account.

In order to reach the goals of the institution, concrete objectives must be chosen. These are the actions (means) to achieve the goals (ends). (See Ends - Means Continuum, page 21.)

3. Strategies

A satisfactory strategy is a plan of action to be carried out to achieve an outcome within a given time span, under specific conditions. Particular strategies are identified and entitled as "activities". The outcome desired and striven for is the objective. The objective may be expressed as a desired result or condition, or the establishment of a desired procedure or activity.

An essential characteristic of an appropriate activity is "specificity". Exemplification of activity in concrete terms is important, e.g., courses, institutes, workshops, field trips, educational leave, etc. This will aid in identifying an activity in operation. Thus the FSD proposal will include a description of a number of activities, under specific titles, which are designed to meet specific discernible objectives.

The measure to which a given activity accomplishes its end is the basis for accountability. A FSD program, must, therefore, have appropriate "yardsticks" for measuring achievement and evaluating improvement of participants.

4. Evaluation

The FSD program for the State TEC System assumes an evaluation of the total program and of each activity. Admittedly, establishing evaluation procedures is difficult, especially when the objectives are intangible as in the case of seminars, conferences, upgrading, etc., in which results may not be immediate. In most cases, however, the objectives or outcome expected can be stated concretely and the performance can be evaluated with a measure of accuracy. Evaluation is facilitated if the criteria by which the activity is to be judged are set within the delineation of the objectives.

Two sets of forms for evaluation purposes are established for the FSD program - the proposal forms and the status report forms.

(1) FSD Program Proposal Application. The proposal application forms in order of occurrence are as follows:
FSD-1, Program Proposal Application - consists of proposal title page with signatures, followed by the proposal narrative;
FSD-2, Activities - provides description of each activity under specific activity titles;
FSD-3, Estimated Budget Summary - provides breakdown of estimated FSD revenue and estimated FSD expenditures.

(2) FSD Evaluation and Status Report Forms. The evaluation and status report forms in order of occurrence are as follows:
FSD-4, Evaluation and Status Report of Activities - consists of institutional evaluation and status reports of activities under specific activity titles;
FSD-5, Budget Summary - provides breakdown exhibit of revenues received and committed and of expenditures made for each and all activities;
FSD-6, Program Evaluation - provides summary exhibit of status and institutional evaluation of each and all activities of FSD program for the year.

II. In-service Development Activities

In-service development activities are directed toward the professional development of the individual employee. Funds for FSD may not be used (1) to cover general operation and maintenance of the institution, (2) for projects such as research, self-study, planning or evaluation of new educational programs, (3) for the development of curriculum or instructional materials, (4) for salaries and fringe benefits, (5) for attendance at associational meetings/conferences at which representation is institutional rather than personal, (6) for clerical service required to effect the FSD program, (7) or for any expense that does not contribute directly to the achievement of the stated objectives of the State TEC System faculty and staff development program.

In this section a number of in-service FSD activities are described and guidelines are given for their operation.

1. Workshops, Seminars, Conferences, and Institutes

Traditionally these activities have involved representation from a group of institutions, but they can be used effectively by individual institutions. Good judgment in scheduling, planning, and follow up activities and evaluations are, of course, necessary for effectiveness. Short-term consultants may be used by the institution, the institutional education divisions, or the departments, or the technical specialties. Optimum utilization of the consultant's expertise should be directly related to objectives set, objectives which are described to the consultant prior to his/her visit.

General objectives of workshops, seminars, conferences, and institutes are opportunities for faculty and staff to stay current in knowledge and skill in their subject or technical areas, and opportunities to participate in activities that will upgrade their skills in developing and using new insights, improved instructional materials, and innovative teaching methods. Continuing Education Units (CEUs) may be awarded if these activities are planned according to CEU criteria.

2. Upgrading Stations for In-service Development

Upgrading stations for in-service development may be established with business and industry, with senior colleges and universities, and on-campus.

(1) Formal Courses of Postsecondary Study. Formal in-service study envisions first identifying competencies and expertise needed but lacking, and then selecting and/or offering members of the faculty and staff opportunity to develop knowledge and skills through formal study financed by the FSD funds. This formal study may be utilized by persons taking courses at a postsecondary institution within commuting distance, or the TEC institution may establish an "On-campus University" by bringing in instructors for courses needed by a number of faculty and staff. These courses may be taken primarily for upgrading or for upgrading and degree credit, but should be chosen to bring a high rate of return in terms of improved competence and performance of faculty and staff.

(2) Work Experience with Industry and Business. Another type of upgrading station is the internship work experience set up with an industry or a business. The TEC institution will encourage, and in some instance require, periodic experience in vocational-technical specialties. This provides faculty and staff opportunities to keep abreast of new developments and work requirements related to the courses they teach and/or the programs they direct.

(3) On-campus Resource Center for Faculty and Staff Development. The third type of upgrading station is a Faculty and Staff Resource Center. Such a center should contain a variety of resources such as selected books and pamphlets for each area of instruction, audio-visual catalogs, and guides, cassettes for professional training and development, educational journals, books and guides for planning instructional strategies, and such other resources deemed necessary. The center should be available exclusively, if possible, for faculty and staff with equipment suitable for full usage.

3. Educational Field Trips

This type of activity can be utilized effectively for in-service development. Field trips include visits to other TEC institutions, to selected senior colleges and universities, and to business and industry. Each type of trip should include a carefully prepared plan for observation and for postvisit evaluation. The visit could use effectively peer seminars with TEC personnel or conferences with supervisors and/or officers in industry or business for the exchange of information and ideas. Visits to other TEC institutions - in-state or out-state - can be planned for representatives of one technology visiting a similar technology in another TEC institution.

Visits to secondary schools should be considered in the formulation of the institution's program. Such visits, if properly planned, will facilitate articulation with the secondary schools in vocational education service areas and will also promote faculty and staff development.

Intrainstitutional visits within the TEC institution by faculty and staff may not be classified strictly as field trips, but they may have desirable results for faculty and staff development if it is clearly recognized that they are made for that purpose. Such visits make possible the sharing of ideas and expertise and have a multiplier effect for the new ideas and new approaches pervading the institution. At the same time these intrainstitutional visits will help counter the danger of excessive specialization, segmented departmental structures, and internal power struggles.

The regular periodic faculty and staff meetings will serve as an intrainstitutional in-service development activity if they are planned with that objective in mind. The programs may include lectures by faculty and staff on particular areas of instruction, panel discussions on subjects of importance to the institution, report on projects, etc.

4. Off-duty Activities

Employees are encouraged to schedule their personal development activities during off-duty hours if possible, but if this cannot be done, the employee may request a change of work schedule for the approved activities. The employer may alter the employee's work schedule, if so doing will not interfere with the normal efficient operation of the employee's duty area.

An employee who takes an approved course under provisions of off-duty activities may receive reimbursement for tuition and course related fees, in total or in part, for satisfactory completion of the course. Satisfactory completion of a course is interpreted to mean "B" grade or higher for graduate or postgraduate study, or "C" grade or higher for all other study. All other expenses, including activity fees, graduation fees, travel, cost of books, and supplies, etc., shall be paid by the employee. Reimbursement for tuition for approved credit courses shall normally be limited to one course per quarter or semester per individual, with reimbursement limited to three approved courses (9 semester hours or 13 1/2 quarter hours) per fiscal year in amount per credit hour not to exceed the highest rate charged for equivalent credit by the state-controlled four-year colleges and universities of South Carolina.

In order to insure that a reasonable return is gained from the investment of development funds in continuing study, the employee who leaves the employment of the State TEC System shall be required to make repayment of all amounts paid for reimbursement for courses completed within the last nine calendar months prior to leaving. Ordinarily, repayment will be by deduction from the final compensation payment.

Reimbursement for off-duty out-state FSD travel shall normally be limited to one approved trip per fiscal year. State regulations relating to travel and subsistence shall apply to all FSD travel - out-state and in-state.

5. Membership in Professional Societies

Employees are encouraged to participate in the activities of professional societies most closely related to their areas of service. The procedure is for the employee to submit a written request for approval of membership, naming the society and the amount of dues. To be reimbursable, the affiliation with the society shall be personal membership (not institutional) and shall be an approved activity of the FSD program for the institution. Reimbursement

for dues, travel expense to attend meetings, and other expenses related to membership shall be limited to an amount specifically approved in the annual FSD budget of the institution; however, the reimbursement for dues in professional societies shall not exceed $50 per individual within a fiscal year.

6. Educational Leave

Educational leave is interpreted to mean permission to be absent from work or duty to pursue an educational objective. The educational objective may be (1) participation in postsecondary courses of study, whether on the undergraduate or graduate level, and for which degree credit is or is not given, and pursued independently or as a part of a curriculum leading to a certificate, diploma, or degree; or the educational objective may be (2) participation in an upgrading work experience with business or industry to improve technological knowledge and skills. Educational leave is granted only for the actual term of the activity. (See "Educational Leave Program" below.)

III. Planning and Budgeting Procedures

Faculty and staff development through in-service education and training has become a national priority in American technical-vocational education and can be clearly seen as an integral and vital responsibility of the State TEC System as it seeks to fulfill its role in postsecondary education in South Carolina. A comprehensive system-wide FSD program is based upon this conclusion. Acceptance of the concept of in-service development and the commitments that a FSD program requires make a judicious planning and budgeting process essential within the local institutions and within the system.

1. Institutional Comprehensive FSD Plan

The FSD program within the institution will function satisfactorily only as a corporate commitment of the institution and as a collective effort of the entire faculty and staff whatever their various levels in competency and in organizational status. The FSD program, therefore, must be communicated, not as a "thing apart" nor as an "ancillary service" to selected individuals, but rather as a privilege and responsibility for one and all. Thus leadership and management are absolute essentials in planning, coordinating, and implementing the program.

(1) Faculty and Staff Development Coordinator. It is the responsibility of the president or director of each institution of the State TEC System to designate a faculty and staff development coordinator who shall be responsible for the administration and budgeting of the program in conformity with the guidelines and procedures for faculty and staff development. The FSD coordinator shall be responsible to the president/director for the satisfactory operation of the institutional FSD program and shall serve in liaison capacity in FSD matters between the institution and the TEC Central Office. He/she shall be chairman of the faculty and staff development committee.

In mobilizing an in-service education and training thrust, leadership and management are special responsibilities. The program requires teamwork among faculty and staff which will result from the harmonious administration and operation of the program. The faculty and staff development coordinator

for each institution should perform this service. He/she should have experience that provides him/her with the attitudes and skills enabling him/her to plan, lead, and evaluate the process and progress of in-service development. Creative leadership and management require that the coordinator have adequate resources for the program, including staff time, and enough authority to get the job done.

(2) Faculty and Staff Development Committee. The roles and responsibilities, institutional and personal, can be accepted by all faculty and staff members, and all can be rewardingly involved in in-service activities of the program. It is crucial, therefore, that the preparation of the FSD program design involve a wise and wide participation of faculty and staff. A faculty and staff development committee, carefully selected and/or elected, is necessary for each institution. This committee should represent a broad spectrum of institutional concerns, and of necessity must be schooled in the philosophy and practical considerations which are basic to a FSD program.

(3) FSD Design Preparation. There is little likelihood that there is one design suitable and adaptable to every institution or situation, but there are a few principles which are basic to every viable FSD program.

The design for faculty and staff development should fit both the institution and the personnel involved. The data of needs assessment should be carefully collected, categorized, and evaluated. A hierarchy of needs should then be made and a plan formulated under priorities indicated and selected. The program designed should be focused on the types of change which the institution desires to make and on the directions which it desires to move. The design should include a plan for collecting and recording all data related to activities of the program in order that progress may be measured and achievements may be evaluated, for the individual and for the institution.

(4) FSD Budget Preparation. The preparation of the FSD budget is a planning and control device in the management of the program - the planned allocation of funds to meet the planned activities of the program. The criteria for the allocation of funds are, first, the needs assessment priorities and, second, the availability of funds. It is essential that the choice of activities with the anticipated expenditures for them be made with consideration of the total financial resources for the entire program.

Under the acceptance of the premise that a FSD program is an integral component of the total institutional operation, each institution of the State TEC System in its unitary budget and plan of operations shall allocate funds for a program of faculty and staff development. To augment and support this allocation, the State Board for Technical and Comprehensive Education shall incorporate within the system budget request to the State Budget and Control Board adequate funds for faculty and staff development for the State TEC System. A supplementary allocation of state funds shall be made to the institutions on a matching-funds "dollar for dollar" basis whereby the institutions will receive a supplemental allocation of state funds equal to the amount allocated to faculty and staff development by the institutions from normal revenue sources.

Funds designated for the purposes of faculty and staff development received through governmental agencies, grants from foundations, and gifts from individuals, businesses, or industries, shall be included in the faculty and staff development proposal budget but such funds shall not be considered in the determination of the supplemental allocation of matching funds.

The institution's allocation from normal revenue sources, the supplemental allocation of state funds, and gifts and grants will comprise the total FSD revenue for the fiscal year. The total of the estimated expenditures for the several planned activities will indicate the cost of the FSD program. Comparison of financial resources and estimated expenditures may necessitate re-examining assumptions, making new evaluation of priorities, or re-defining objectives. Refining the program design by making appropriate modifications must be assumed as essential in the planning and budgeting procedures.

(5) Promotion. In order to develop a comprehensive FSD program it is necessary to obtain, organize, and disseminate all types of in-service development information to faculty and staff. The FSD program should be a sharing experience of information and action. Opportunities should be given for individuals to explore the concept of in-service development in relation to their personal needs and aspirations and in relation to the needs and purposes of the institution. It appears, therefore, that institutional workshops on in-service development are appropriate for program design and implementation.

The workshop procedure - the task force approach - could take the form of a regular or special faculty and staff meeting, followed by mini-workshops by divisions or departments. The general workshop should be limited in scope, confined to dissemination of information, FSD materials, budgeting procedures, and a step-by-step guide to program design and implementation. The mini-workshops should provide individuals with specific guides and materials for the identification of divisional/departmental and individual need priorities, and the selection of activities to accomplish objectives chosen. The compilation and review of the output from these workshops by the FSD coordinator and the FSD committee will give the data for review, modification, and approval necessary for the formulation of the institutional FSD program.

The task force approach will be useful in (1) assuring institution-wide participation, (2) assuring an understanding of the role of FSD in individual and institutional development, and (3) assuring commitment to FSD by the faculty and staff.

2. Individual FSD Plan

The keystone for an effective FSD program lies in the realm of individual involvement in the program. Ultimately it is the motivation and will of the individual that forms the basis for participation, and it is the collective accomplishments of all personnel that measures the institutional success of the FSD program.

It is highly desirable that each member of the faculty and staff have a continuous personalized plan for his/her development, with identified objectives and strategies - a program tailored to his/her needs, personal characteristics, and institutional responsibilities.

It can be assumed that a large number of faculty and staff members are willing to engage in a formal development program to improve their effectiveness in their work. It can also be assumed that there will be some resistance to a serious program for faculty and staff development. Some will feel or

argue that they do not need what is offered. Perhaps the greatest reluctance to participate will come from those who feel that they are already overburdened with duties and do not have time. What is asked, however, is just a small fraction of time, probably no more than three to five percent of the usual workweek. No program will thrive unless faculty and staff allocate the necessary time. Prior to any FSD activity, an outline of the entire FSD program should be given to faculty and staff. If this is done, individuals can begin to organize their own time around the activities planned for them, and the development program will become a part of the individual's schedule.

Most faculty and staff need encouragement to become involved in the FSD program. Familiar incentives used by institutions are earned merit increments, tuition payments, educational leave, and promotions. These awards benefit the individual, but they are considered justified as necessary for increased effectiveness of the institution in accomplishing its educational purposes for the students and the community.

The Compensation Plan for the State TEC System provides incentives for a planned personal development program. The funding provisions of the FSD program are definitely related to the compensation plan, and should be coordinated within the individual FSD plan.

In planning an individual's FSD program it must be assumed that the individual will contribute not only his/her time for some activities, but that he/she will contribute both time and money for certain activities of his/her program. It cannot be assumed that the FSD program can provide sufficient funds to cover all the expenditures for individual development activities. The funding provisions of the FSD program are designed to assist the employee in his/her development, but the primary responsibility is upon the individual to qualify for increased competence and productivity and the benefits therefrom. Limitations, therefore, on individual FSD activity expenditures shall be enforced at the institutional level and at the state level.

3. State Board's Comprehensive Plan

The philosophy and state-wide goals of the South Carolina Technical Education System contain the commitment to educational objectives that meet the current and emerging needs of the State, its people, and its industries. Qualified personnel who have new and/or updated competencies to implement the purposes of the system are essential. To help the local institutions meet this need, the State Board for Technical and Comprehensive Education has accepted state-wide responsibility for the activities outlined below.

(1) Providing state funds for faculty and staff development. The State Board's role in this involvement is to insure that state funds are directed to activities that have the greatest impact for FSD for the institutions and the state.

(2) Developing and recommending general guidelines and procedures for management of local FSD programs. The local institution is in the best position to make needs assessment and project goals and strategies. The State Board will formulate principles and procedures for concerted effort and inter-institutional communication and participation in the operations of FSD programs.

(3) Sponsoring and organizing state-wide conferences, workshops, and consortia. The State Board will initiate and promote joint ventures which meet objectives of all institutions involved. The aim is to generate a greater thrust for personnel development throughout the State TEC System.

(4) Coordinating state services that have potential for supporting the FSD program. A particular function of the State Board in FSD is to coordinate out-system support services of educational institutions, business and industry, and community and state agencies, and to plan activities that will utilize their support, expertise, and resources.

(5) Making state-wide assessments of the range, scope, and accomplishments of FSD programs. Collecting and publishing state-wide reports about the FSD programs will furnish helpful feedback that reflects the state-wide status of FSD. In doing this, the State Board will furnish interinstitutional liaison in the State TEC System.

(6) Acting as a state-wide service agency to provide FSD leadership and counseling for the institutions of the TEC Sytem. Purposes and problems in the system are, after all, interrelated and institutional improvement and system improvement are a team responsibility. Each institution is expected to focus attention and effort on its primary FSD service within the institution, but periodically the coordinators of the institutions will be called together to make an overall system survey and share information for FSD decision making and to assure coordination and relevancy in order to achieve state-wide as well as local objectives.

IV. Participation in Faculty and Staff Development

The following participation guidelines are set forth to assist institutions and individuals in the implementation of the FSD program for the State TEC System. Some repetition of principles and procedures given above will be necessary as specific instructions for participation are delineated.

1. Administrative Criteria

The following administrative criteria apply to the operation of the FSD program.

(1) Responsibility and Control. The TEC organization, institution or central office division, must have professional staff empowered to administer and coordinate the schedule of activities to assure that both the activity objectives and the FSD criteria are met. Institutional and individual records must be maintained and kept readily available for personnel files and for reporting and auditing procedures. The FSD coordinator and the FSD committee are specifically charged with the responsibility for leadership and control of the program.

(2) Planning, Implementation, Evaluation. It is expected that each institution will develop a clear statement of rationale and goals for its FSD program. The systems approach program design will have three major components: planning, implementation, evaluation.

Planning. Planning is a vital responsibility in the FSD program. The program has its unique motion elements moving from one level of input to the next and accumulating information, experiences, and understanding. It is for this reason that individual faculty and staff should be familiar with the FSD program and how it works - its purposes, its limitations, its procedures. The effective role of FSD can be assured only by effective coordination through communication, leadership, and broad involvement of faculty and staff.

Program planning, including budgeting, involves the assessment (audit) of both needs and resources. This process should include input from individuals of faculty and staff and knowledgeable persons having expertise in collecting, tabulating, and interpreting data. In addition, the planning process must include making an inventory of resources (people, funds, materials, space, equipment) available to meet identified needs.

In planning the FSD budget of the institution, priority shall normally be given to institution-wide or group in-service activities. In planning the FSD budgets of individuals, funds shall normally be allocated widely and objectively among the faculty and staff. Of necessity, limitation of individual FSD expenditures must be enforced, primarily in relation to reimbursement for tuition and out-state travel. (See restrictions, pages 8-9.)

Implementation. Activity is the term chosen to indicate a specific course of action to achieve an FSD objective. Implementation of the FSD program requires the careful selection of activities to actualize the objectives formulated to meet identified needs. In-service development activities that are separate in action but of the same kind or type can be classified in combination, forming a "Development Activity Unit" (DAU) under one general title - an overall strategy to actualize a general objective.

The permitted uses of FSD funds may be classified in DAUs under general titles. The classifications given below cover most of the FSD activities, but other titles may be used if more descriptive of special activities.

Postsecondary Education
Formal courses on campus or off campus, credit or noncredit, postgraduate or undergraduate, without tuition reimbursement or with tuition reimbursement in total or in part, pursued independently or as a part of a curriculum leading to a degree, diploma, or certificate.

On-campus Short Courses
Short courses to improve skills in instruction, planning, decision-making, task execution, use of multi-media, continuing education courses - with or without CEUs.

On-campus Workshops/Seminars/Conferences/Institutes
Consortia with other institutions or intrainstitutional on-campus, with or without consultants, with or without CEUs.

Off-campus Workshops/Seminars/Conferences/Institutes
Consortia with other institution or interinstitutional workshops, etc., off-campus, with or without consultants, with or without CEUs.

Professional Societies
Membership dues and travel.

Educational Field Trips
Field trips to TEC and other institutions and to business and industry.

FSD Resource Center
Educational supplies and equipment.

Educational Leave
Postsecondary education or work with business or industry.

Evaluation. The measure to which a given FSD activity accomplishes its end (outcome in relation to cost) is the basis for accountability. Every FSD activity, therefore, whether a single activity or a development activity unit requires that the applicant identify a "specific need" that justifies approval. In addition, the "expected outcome" to actualize objectives that must be described on the application should be stated in terms of competency, performance, knowledge, or some combination of these, depending upon the nature of the activity. These statements describe anticipated results and provide a way of measuring success and value.

In brief, evaluation criteria are necessary for every FSD activity, not as afterthoughts, but as the predetermined measures by which the outcome should be judged. The criteria are set in the FSD-2 application; the judgments are given in the FSD-4 evaluation and status report.

2. Operational Guidelines

A correct approach is necessary for satisfactory operation of the FSD program. Insight and uniformity will be gained after experience, but certain objective guidelines are inherent in the organizational nature of the program.

(1) Program Proposal. The purpose of the program proposal is to assure a comprehensive and viable TEC-wide program of FSD activities. The institutional proposal is prepared on an annual basis by the FSD coordinator under the TEC-wide format. Three forms with narratives attached are required - FSD-1, FSD-2, FSD-3.

FSD-1, Proposal Title Page. The FSD-1 program proposal form consists of the title page with necessary signatures, followed by the narrative summary of program plans for the year.

FSD-2, Activity Application. The FSD-2 form provides description for either individual activities and/or unit activities (DAUs). The use and preparation of the activity application is of utmost importance and requires special consideration.

It is mandatory that each FSD activity be covered by an activity application (FSD-2) which is made by an individual for himself or by a supervisor on behalf of a group. The application may be made on either the standard FSD-2 form or on an in-house form prepared for institutional use but requiring the essential data. These individual and group applications must be kept on file for accountability - record, reporting, FSD documentation (audit). Through classification and compilation of these applications the DAUs are formulated. The DAUs may be organized for an institution as a whole, or for an institution by divisions or by departments or by areas of service. The number and titles of DAUs should be adequate to give a clear and compete picture of the FSD program for the institution.

The FSD-2 activity applications, which accompany the program proposal, must be prepared on the standard FSD-2 form and submitted to the Coordinator for Faculty and Staff Development,* State Board, for approval. This form calls for adequate activity identification, purpose, and estimated cost. In most instances, this application will be entitled as a DAU, e.g., postsecondary education, workshops/seminars/conferences/institutes, professional societies, interinstitutional visitations, FSD resource center. Consequently very few applications will be submitted to the state FSD coordinator although the local institution has accumulated a number of individual activity applications compiled to make the DAU.

The information which must be included on each activity application (individual or DAU) is as follows:

Institution name
Activity title
Activity date(s)
Activity location - city, state
Number of participants
Name of individual or group
Specific need
Outcome expected - objectives to be accomplished
Estimated cost (see chart of accounts below)
Signature - applicant, FSD coordinator
Date submitted, Date approved
Activity narrative (mandatory if DAU)

Special attention should be given to the identification of "specific need" and "outcome expected". This requires answers to certain questions. First, "Why was this particular activity chosen?" Next, "What outcome (what ability)(or what skills) (or what knowledge) is expected from this activity?" Asked another way, "What is the evidence that the objectives have been met?" The applicant(s) should be able to say, "At the end of this activity I (we) shall be able to ..." in relation to a need in a functional area on-the-job in TEC.

In making an activity application, each member of the faculty and staff should understand and be prepared to use the current FSD chart of accounts. The FSD account number, title, and explanation follow:

530100 Salaries
Salaries of visiting instructors for on-campus courses (not honoraria for consultants). This account covers also stipend (salary) for Educational Leave (substitute's salary not allowed from FSD funds).

530202 Travel and Subsistence
Authorized institutional travel expense for individual or group for approved FSD activity and approved in conformity with state law governing mileage and per diem. (Travel expense for attendance at institutional association meetings or commuting expense for education courses or for work experience is not covered under FSD funds.)

530214 Educational Consultants
Honoraria and other expenses for consultants - on-campus or consortia. Travel for consultants must be charged to this account (not 530202).

*This title effective July 1, 1975.

530307 Educational Supplies

Educational supplies for upgrading station, Faculty and Staff Resource Center, for use exclusively for faculty and staff development, e.g., professional journals and books, professional education modules, and cassettes. Covers also limited expense for duplicated materials for consortia (workshops, seminars/conferences/institutes) but not costs of personal books and supplies.

530411 Professional Memberships

Individual membership dues of professional societies (not civic nor political organizations). Authorized travel cost within limits set by the institution for attendance at meetings of professional societies is charged to 530202.

530470 Tuition Reimbursement

Tuition for approved postsecondary courses, in total or in part, and course related fees, if any. (Reimbursement is not allowed for travel, cost of books and supplies, and incidental fees.) This account covers also registration application for workshops/seminars/conferences/institutes.

530607 Educational Equipment

Expense of educational equipment is restricted exclusively to purchase for FSD Resource Center. Equipment must be specialized equipment which is essential to faculty and staff development and must be used in an innovative application. It may not duplicate nor replace available equipment nor meet regular institutional equipment needs. Special justification must accompany application for purchase approval.

FSD-3, Budget Summary. The FSD-3 form gives a FSD budget summary of estimated income from normal revenue sources and matching allocation of state funds and of estimated expenditures for the various activity applications. The summary lists activities by DAU titles, with total estimated expenditures for each (without breakdown into account classification). This budget summary is submitted with the annual program proposal and serves to govern FSD expenditures during the fiscal year.

(2) Program Reports. The annual FSD program report is composed of three major divisions, utilizing three forms.

FSD-4, Activity Evaluation and Status Report. A separate report for each approved activity application (FSD-2) must be made. The FSD-4 should be completed at the time of completion of an activity and held for inclusion in the annual FSD report as documentation for FSD-5 and FSD-6. This report consists of two parts.

Funds Data. Each application for activity approval (FSD-2) includes an estimate of expenditures for the activity; each evaluation and status report (FSD-4) must give the actual cost of the activity. The compilation of data from individual activity reports will give the data for a DAU report (FSD-4). This data will be reflected in expenditures recorded in the fiscal budget summary (FSD-5).

Activity Status and Evaluation. The status and evaluation report provides for a detailed institutional report of status and evaluation of each activity. An adequate narrative must be attached to the FSD-4 report, giving the institutional evaluation of the activity. The narrative should document briefly but adequately the results/outcome of the activity. This report will be reflected in the annual institutional evaluation of activities (FSD-6).

FSD-5, Year-end Fiscal Budget Summary. This document provides breakdown exhibit of funding sources (revenues allocated and committed) and expenditures made for all activities of the fiscal year ended on June 30. All expenditures reflected under FSD-5 column designated "Approved (FSD-2)" must be consistent with approved line items on the application for activity approval (FSD-2) and the actual expenditures reported on the evaluation and status report (FSD-4). This report will also reflect funds budgeted for restricted sponsored FSD activities described in an application for activity approval (FSD-2). Restricted sponsored revenue should be disclosed to the extent expended during the report period. The FSD-5 carries DAU titles with costs for each listed by account number.

FSD-6, Annual Institutional Evaluation of Activities. This report provides a summary exhibit of status and institutional evaluation of each and all activities of the FSD program for the fiscal year. The report lists all DAUs by title and objectives, and provides information covering activity status, evaluation, and actual costs. The evaluation criteria are set in a "Key for Institutional Evaluation of Activities."

The coordinator of faculty and staff development for the State Board will prepare an annual report, with exhibit by institution, of all FSD institutional activities of the South Carolina Technical Education System. The institutional reports (FSD-6) will provide the information for this report.

CENTRAL OFFICE STAFF DEVELOPMENT PROGRAM

The policy of the State Board for Technical and Comprehensive Education grants authority for activities and funding for a staff development program for State Board Central Office employees. The purpose set forth in the policy and the guidelines and procedures issued for TEC institutions by the executive director govern the staff development program for the central office employees, subject only to such modifications as are necessary for the appropriate operation of the program for the central office employees. All employees of the central office shall be accorded the privileges of the program established, and shall comply with the stipulations governing the program as set forth in the policy adopted and the guidelines and procedures issued.

In the following sections special guidelines and procedures are described for the operation of the staff development program for central office employees.

I. Design for Staff Development - Central Office

For the purposes of staff development the several divisions of the central office shall be considered as a whole, with one design and one budget. The director of each division of the State Board shall coordinate the activities of the employees of his/her division, and shall submit approved applications for activities to the coordinator of faculty and staff development for the State Board. Based on approved activities submitted by division directors, the state coordinator of faculty and staff development shall prepare the central office program proposal and submit it to the executive director for consideration and action.

1. Development Activities

Employees of the central office are eligible for the in-service development activities described in the guidelines and procedures for FSD of the State TEC System, subject only to restrictions inherent in specific activities and the availability of funds.

2. Application for Activity Approval

An employee, or a group of employees, wishing to have an activity considered shall submit a written application to his/her immediate supervisor, who shall attach his/her recommendation before forwarding the application to the division director. All activities of the employees of a division shall be approved by the division director.

3. Selection of Activities

Activities shall be selected and approved on the basis of promise of benefit to the State TEC System as follows: (1) to develop the skills and/or knowledge to meet identified needs in the operation of the State TEC System, and/or (2) to meet the demand for adequately trained personnel for existing or projected positions of service essential to the administration of the central office.

4. Off-duty Activities

Employees are encouraged to schedule their personal development activities during off-duty hours if possible, but if this cannot be done, the employee may request a change of work schedule for the approved activities. The employer may alter the employee's work schedule, if so doing will not interfere with the normal efficient operation of the employee's duty area.

An employee who takes an approved course under provisions of off-duty activities may receive reimbursement for tuition and course related fees, in total or in part, for satisfactory completion of the course. Satisfactory completion of a course is interpreted to mean "B" grade or higher for graduate or post-graduate study, or "C" grade or higher for all other study. All other expenses, including activity fees, graduation fees, travel, cost of books, and supplies, etc., shall be paid by the employee. Reimbursement for tuition for approved credit courses shall normally be limited to one course per quarter or semester per individual, with reimbursement limited to three approved courses (9 semester hours or 13 1/2 quarter hours) per fiscal year in amount per credit hour not to exceed the highest rate charged for equivalent credit by the state-controlled four-year colleges and universities of South Carolina.

In order to insure that a reasonable return is gained from the investment of development funds in continuing study and training, the employee who leaves the employment of the State TEC System shall be required to make repayment of all amounts paid for reimbursement for courses completed within the last nine calendar months prior to leaving, ordinarily by deduction from the final compensation payment.

5. Membership in Professional Societies

Employees are encouraged to participate in the activities of professional societies most closely related to their areas of service. The procedure is for the employee to submit a written request for approval of membership,

naming the society and the amount of dues. The dues for affiliation with the society shall be for personal membership and shall have written approval of the division director, made in advance upon recommendation of appropriate division official. The reimbursement for dues in professional societies shall not exceed $50 per individual within a fiscal year. Travel and other expenses to attend professional society meetings may not be included in staff development expense, but may be authorized by the division director from the division budget.

6. Educational Leave

Provisions for educational leave are set forth in the policy document of the State Board for Technical and Comprehensive Education under the title: "Educational Leave Program for South Carolina Technical Education System."

II. Planning and Budgeting Procedures

The planning and budgeting procedures for the central office shall follow in general those established for the institutions, with such exceptions as necessary for central office operations. The calendar for plans and reports, and the other proposal and report forms shall be used, as applicable.

1. Central Office Staff Development Plan

The director of faculty and staff development for the State Board, following the calendar for plans and reports, shall establish a timetable for the selection of activities and/or participants for the central office. In developing the timetables, cut-off dates for accepting applications for admission to colleges and universities shall be considered. Timely announcements of timetables and development program information shall be made.

It shall be the responsibility of the division directors to approve all development activities of his/her division and to forward them to the state coordinator of faculty and staff development. The approved activities of the several divisions of the central office shall be put in proposal form, with budget summary, and submitted to the executive director for his review and action.

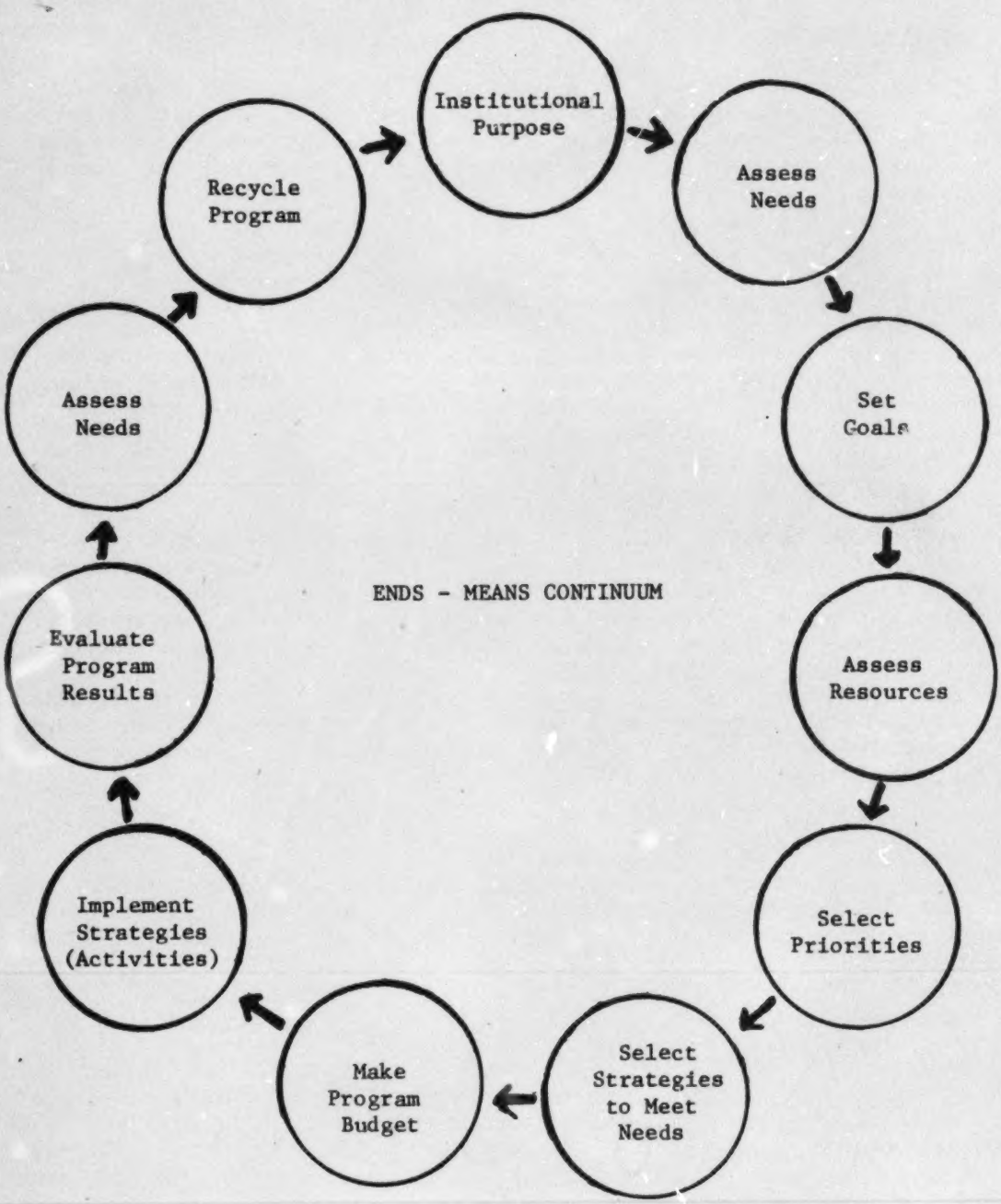
2. Central Office Staff Development Budget

The State Board shall incorporate within the system budget request to the State Budget and Control Board adequate funds for a staff development program for employees of the central office.

Funds committed for the staff development program shall be expended only for activities which are clearly identifiable and reasonable under the approved development plan. The program shall be operated on a fiscal year basis under a clearly identified budget of funds available and committed. The budget shall be prepared and administered in conformity with the fiscal policies and procedures of the State TEC System.

FACULTY AND STAFF DEVELOPMENT PROGRAM

The Systems Approach



EDUCATIONAL LEAVE PROGRAM

I. Definition of the Program

1. General Purpose

The purpose of the educational leave program is to provide a means by which each of the faculty and staff of the South Carolina Technical Education System may have opportunity to further his/her education and to improve his/her skills and efficiency in his/her present position and to prepare for opportunities for his/her advancement with the State TEC System.

2. Participants

Faculty and staff are terms interpreted to include teaching faculty, administrators, and other noninstructional employees such as clerical, maintenance, janitorial, and auxiliary personnel. Each full-time employee of the State TEC System, without regard to sex, age, religion, race, color, or national origin, may participate in educational leave, subject only to restrictions inherent in specific types of leave.

3. Definition of Educational Leave

Educational leave is interpreted to mean permission to be absent full-time or part-time from work or duty, with or without stipend, to pursue an educational objective. The educational objective may be (1) participation in postsecondary courses of study, whether on the undergraduate or graduate level, and for which degree credit is or is not given, and pursued independently or as a part of a curriculum leading to a certificate, diploma, or degree; or the educational objective may be (2) participation in an upgrading work experience with business or industry to improve technological knowledge and skills. Educational leave shall be granted only for the actual terms of the activity.

4. Eligibility

Any permanent full-time employee in good standing of the State TEC System who has satisfactorily completed at least nine months of continuous employment during his/her current period of employment is eligible for educational leave.

5. Applying for Leave

An eligible employee shall apply by submitting a formal application through organizational channels to the president or director or his designee at least ninety (90) days before the first day of leave requested. Such submittal shall be made by the employee to his immediate supervisor, who may attach his recommendations before forwarding the application to the president or director or his designee.

The application shall include (1) the type, purpose, and duration of the leave requested; (2) verification of acceptance for entrance into the activity for which the leave is requested; (3) such other information as will be helpful to the reviewing authority in reaching a determination.

6. Selection of Recipients

The selection of recipients shall be based upon the following general objectives: (1) to develop the skills and/or knowledge of employers to meet development needs of faculty and staff of the institution, and/or (2) to meet the demand for adequately trained personnel for existing or projected specialized positions of instruction or administration essential to the successful operation of the State TEC System.

Factors to be considered in the selection of participants shall include:

(1) Length of prior service;
(2) Past performance reviews;
(3) Demonstrated commitment to the objectives of technical-occupational education;
(4) Need/value of upgrading training for job performance;
(5) Specifically identified need of the institution or the State TEC System for the upgrading training proposed;
(6) Possible disruption of participant's areas of service during activity;
(7) Funds available for proposed activity.

7. Notification

Insofar as possible, the employee's request shall be acted upon and the employee notified no later than sixty (60) days prior to the first day of leave requested.

If the application is approved, an educational leave contract stipulating the conditions of the leave shall be issued in triplicate, bearing the signature of both the employee and the president or director. The original and one copy shall be submitted to the state coordinator of faculty and staff development for necessary consideration and action.

8. Reinstatement

Upon an employee's successful completion of a full-time leave, he/she shall be reinstated to his/her former position, given a position of like status and pay, or promoted to a higher position.

II. Stipend Provisions for Educational Leave

1. Stipend Definition

A stipend is interpreted to mean a basic living allowance to provide support of a person otherwise motivated to continue his/her education.

2. Amount of Stipend

The basic living allowance shall not exceed 60% of the compensation (salary) in effect for the employee at the date of approval of his/her educational leave, payable in regular pay periods during his/her period of leave.

3. Reimbursement for Tuition and Fees

Employees on full-time or part-time leave, for postsecondary education, may receive reimbursement for tuition and course related fees, in total or in part, for satisfactory completion of approved courses. Satisfactory completion is interpreted to mean "B" grade or higher for graduate or post-graduate study, or "C" grade or higher for all other study. All other expenses, including activity fees, graduation fees, travel, costs of books and supplies, etc., shall be paid by the employee.

4. Where Stipend Can Be Used

(1) Postsecondary Education. If a program of study for which a stipend is awarded is offered by one or more accredited institutions of higher learning within the State of South Carolina and the recipient is able to gain admission to one of these, the stipend shall be used in said institution. If not, the stipend may be used at any accredited institution to which the recipient is able to gain admission.

(2) Work Experience with Business or Industry. The stipend awarded for work with business or industry shall be used for an approved upgrading work experience in a responsible position in the recipient's particular specialty. This work experience shall be in other than an academic environment and shall not involve the recipients' giving instruction to others in a business or industry.

5. Leave-Stipend Committees

(1) Institutional Leave-Stipend Committee. The faculty and staff development committee shall serve as the leave-stipend committee for the institution and shall take appropriate action to select stipend recipients, subject to review and approval of the president or director.

(2) Central Office Leave-Stipend Committee. The state coordinator of faculty and staff development and the division directors shall serve as the leave-stipend committee for the State Board for Technical and Comprehensive Education and shall review the stipend applications received from the institutions and make recommendations to the executive director of the State Board.

6. Stipend Approval

The stipends to be offered within the State TEC System must be approved by the State Budget and Control Board each year. Each institution must determine what stipends are needed and submit a request for the stipends, with all necessary data, to the director of faculty and staff development. He will collate the requests from the institutions and furnish a list of requests to the central office leave-stipend committee. The central office leave-stipend committee will review the applications received from the institutions and make recommendations to the executive director, who will approve the stipends to be offered and will submit a letter requesting authorization to the State Personnel Director for the approval of the Budget and Control Board. At least one month must be allowed for Budget and Control Board approval. (Stipend requests should be included in the FSD proposal for the fiscal year.)

7. Limitation of Stipend

If the recipient of educational leave for postsecondary education or for work experience with business or industry receives educational allowance (excluding veterans' benefits and loans) from any other public or private source and/or compensation for work experiences, the total amount of such allowances and the stipend shall not exceed the recipient's contract salary at the time of leave. If the nonstipend allowances exceed 40% of the contract salary, the stipend shall be reduced accordingly.

8. Deductions from Stipend

It should be noted that stipends awarded under this program are considered taxable income by both the South Carolina Tax Commission and the Federal Internal Revenue Service. Stipend payments, therefore, are subject to withholding for income taxes, South Carolina Retirement System, F.I.C.A., and any other deductions the employee may authorize.

9. Concurrent Awards and Benefits

An employee who accepts a stipend award under these provisions may apply for and accept a research assistantship or a teaching assistantship through the university he/she is to attend. Recipients may receive all benefits to which they are entitled as veterans. They may also apply for any of the various student loans available from governmental agencies, private lending institutions, etc., However, a recipient may not concurrently receive an educational allowance from any other public or private source when that allowance is conditioned on a conflicting employment obligation incurred by the recipient. To accept such aid will result in the immediate forfeiture of the stipend. A person who forfeits a stipend in this manner will be obligated to fulfill his/her service commitment or make repayments to the institution under the terms of the educational leave contract.

III. Types of Educational Leave

Educational leave is of three general types: (1) Educational Leave for Postsecondary Education - part-time leave (with part-time employment), without stipend or with stipend; and full-time leave, without stipend or with stipend; (2) Educational Leave for Work with Business or Industry - part-time leave (with part-time employment), without stipend or with stipend; and full-time leave, without stipend or with stipend; and (3) Agency Directed Educational Leave for Postsecondary Education - part-time or full-time, with full salary.

1. Educational Leave for Postsecondary Education

(1) Part-time Educational Leave for Postsecondary Education. Part-time educational leave for postsecondary education is interpreted to mean reduction of work or duties in order that the employees may take approved courses in postsecondary education. The employee thus becomes a part-time employee of the institution.

Part-time Educational Leave without Stipend. Part-time educational leave without stipend may be granted an employee under provisions that he/she will have a reduced workload with proportionate reduction in regular compensation

for the term of leave. The employee will fulfill duties commensurate with the compensation, but shall receive no stipend.

Part-time Educational Leave with Stipend. Part-time educational leave with stipend may be granted an employee under provisions that he/she have a reduced workload with proportionate reduction in regular compensation for the term of leave. The employee, however, may receive a stipend to cover in part the reduction in regular compensation during the period of leave. The part-time stipend shall be the proportionate amount of full-time stipend.

Reimbursement of Tuition. An employee who takes approved courses under the provision of part-time educational leave, with or without stipend, may receive reimbursement for tuition and course related fees, in total or in part, for satisfactory completion of the courses.

(2) Full-time Educational Leave for Postsecondary Education. Full-time educational leave without stipend is interpreted to mean nonpay status on leave to attend a postsecondary educational institution for an approved program of study.

Full-time Educational Leave without Stipend. Educational leave without stipend for full-time postsecondary education may be granted for a continuous period of not more than nine months between September 1 and June 1 in approved courses of study that cannot be normally scheduled between June 1 and September 1 of a calendar year.

Reimbursement of Tuition. An employee in the nonpay leave status may receive reimbursement for tuition and course related fees, in total or in part, for satisfactory completion of approved courses.

Full-time Educational Leave with Stipend. Full-time educational leave with stipend is interpreted to mean leave with stipend to attend full-time a postsecondary educational institution for an approved program of study.

Postsecondary Education with Stipend. Full-time leave with stipend may be granted for the length of a college term or terms not to exceed nine (9) consecutive months, or a total of eighteen (18) months within a 48 month period.

Approved Curriculum. The recipient shall be enrolled full-time in courses of a curriculum approved under the individual's FSD program within the area of his/her professional responsibility and/or courses that will contribute to the effectiveness and efficiency of programs and/or administrative functions of the State TEC System.

Course Workload. The recipient shall take no less than the normal course workload as defined by the institution he/she is attending, with the exception of the last term in the institution during which he/she may take as few course hours as are necessary to complete the requirements for graduation.

Satisfactory Academic Achievement. The recipient is expected to maintain satisfactory academic achievement which is interpreted to mean an academic average of "B" or better for graduate and postgraduate work, and "C" for all other study.

Reimbursement of Tuition. In addition to the stipend, the employee may receive reimbursement for tuition and course related fees, in total or in part, for satisfactory completion of approved courses.

Note. All stipend recipients are subject to applicable restrictions set forth in section II, Stipend Provisions for Educational Leave.

2. Educational Leave for Work with Business or Industry

Approved Work Program. The selection of recipients and approval of work program shall be based upon the following objectives: (1) to provide faculty and staff with opportunities to keep abreast of technical developments and work requirements in business and industry, and (2) to upgrade the employee's competence as a technologist-educator in fulfilling the institution's educational purposes in technical-occupational education.

(1) Part-time Educational Leave for Work with Business or Industry. Part-time educational leave is interpreted to mean reduction of work or duties in order that the employee may participate in an approved program of upgrading work experience. The employee thus becomes a part-time employee of the institution.

Part-time Educational Leave without Stipend. Part-time educational leave for work with business or industry may be granted an employee under provisions that he/she will have a reduced workload with proportionate reduction in regular compensation for the term of leave. The employee will fulfill duties commensurate with the compensation, but shall receive no stipend.

Part-time Educational Leave with Stipend. Part-time educational leave for work with business or industry may be granted an employee under provisions that he/she have a reduced workload with proportionate reduction in regular compensation for the term of leave. The employee, however, may receive a stipend to cover in part the reduction in regular compensation during the period of leave. The part-time stipend shall be the proportionate amount of full-time stipend.

(2) Full-time Educational Leave for Work with Business or Industry. Full-time educational leave without stipend is interpreted to mean full-time leave in order that the employee may participate in an approved program of upgrading work experience, without stipend or with stipend.

Full-time Educational Leave without Stipend. Full-time leave without stipend for upgrading in-service work experience with business or industry may be approved for a continuous period of not more than nine months between September 1 and June 1.

Full-time Educational Leave with Stipend. Full-time leave with stipend for work with business or industry may be granted for a continuous period of time not to exceed nine consecutive months, or a total of eighteen (18) months within a 48 month period.

Note. All stipend recipients are subject to applicable restrictions set forth in section II, Stipend Provisions for Educational Leave.

3. Agency Directed Leave for Postsecondary Education

(1) Definition. Agency directed educational leave is interpreted to mean full-time or part-time leave, specifically directed by the agency head, with full salary, tuition, and agency approved fees, paid by the agency.

(2) Purpose. The State Board for Technical and Comprehensive Education, as an agency of South Carolina State Government, may provide educational leave for employees in order to develop skills and/or knowledge needed in positions in the State TEC System.

(3) Selection of Recipients. When it has been determined that in order to fill a position in question it will be necessary to train a person currently on the payroll by sending him/her to a postsecondary educational institution, an announcement relating to the position shall be circulated at least one month prior to the deadline for applications.

An employee wishing to be considered for the training shall submit a request in writing prior to the cut off date. Such submittal shall be made by the employee through organizational channels to the president/director of an institution or to the appropriate division director of the central office.

Final selection shall be made to the central office leave-stipend committee, subject to review and approval by the executive director of the State Board.

(4) Request for Authorization. Agency directed educational leave shall be approved in advance by the State Budget and Control Board. A letter of "Request for Authorization" shall be submitted by the executive director of the State TEC Board to the Budget and Control Board for approval at least 45 days before classes are scheduled to begin.

An educational leave contract shall be completed by the applicant and approved by the executive director. The original and two copies of the contract shall accompany the request for authorization. The State Director of Personnel shall indicate the Budget and Control Board's approval by signing the contract. The original and one copy shall be returned to the executive director of the State TEC Board; the remaining copy shall be retained by the State Personnel Division.*

Note. All recipients of agency directed leave for postsecondary education are subject to applicable restrictions set forth in section II, Stipend Provisions for Educational Leave, and section III, 1. Educational Leave for Postsecondary Education, above.

*These guidelines are compatible with the philosophy and intent expressed in the document, "Educational Leave Program for Agencies of South Carolina State Government", adopted by the State Budget and Control Board, January 23, 1974.

IV. Educational Leave: Employee-Employer Obligations

1. Obligation of Employee to Employer

The recipient shall be committed to serve the institution of the State TEC System for at least one and one-half months for each full or partial month the stipend is received.

If an employee fails to return to work within 30 calendar days after completing the term of educational leave stipulated in his/her educational leave contract other than for good cause, repayment of total expenses paid by the institution during the leave term (salary, tuition, fees, etc.) shall be paid within 30 days. If an employee terminates his/her employment with the institution before completing his/her obligatory services for any reason other than for good cause, repayment of expenses paid by the institution during the leave terms (salary, tuition, fees, etc.) shall be paid within 30 days in an amount proportionate to the time remaining in his/her service obligation and the total expenses paid. Good cause shall be limited to long-term disability resulting from personal illness or injury, or illness within the immediate family (spouse or child) which makes it necessary for the family to relocate.

The amount of the repayment shall not exceed the total expenses paid by the institution during the leave period (salary, tuition, fee, etc.). The institution may deduct the amount owed from checks due the employee for salary and unused annual leave earnings.

In the event the employee is called into service by a branch of the United States armed forces, he may complete his obligation to the institution upon release from the military.

2. Obligation of Employer to Employee

The institution may dismiss or suspend the employee, or cancel the leave only for good cause. Good cause includes breach of contract, failure to meet the social or academic standards of the postsecondary institution, or the established standards required for all state employees.

Upon the recipient's successful completion of his/her course of study, the employer shall reinstate him/her to his/her former position, to a position of like status and pay, or promote him/her to a higher position.

If, for any reason other than leave cancellation for breach of contract or misconduct, a recipient does not complete the course of study for which the stipend was granted, the institution shall reinstate him/her to his/her former position or to a position of like status and pay.

3. Leave Cancellation and Standards of Conduct

Academic Standing. If the employee fails to maintain an academic average of "B" or better for graduate or postgraduate study, or "C" or better for all other study, the president or director of the institution may cancel his/her stipend.

Conduct. The recipient shall be aware that he/she is a representative of the State TEC System and its institutions and the state and, as such, is responsible for the image he/she reflects. Excessive absence, participation in campus disturbances or any other activity which would bring discredit to the State TEC System and its institutions or the State of South Carolina may result in cancellation of the stipend and/or such other appropriate action as the misconduct may warrant.

Cancellation. Upon cancellation of the stipend, the recipient may be either reinstated by the institution in the same or like position held at the time the leave was granted, or discharged as appropriate.

4. Status of Stipend Recipients While on Educational Leave

Employees receiving stipends under this program shall be considered to be on full-time educational leave with part pay.

While in leave status, recipients shall not earn annual leave or sick leave. Accrued annual and sick leave earnings shall be carried over until the employee returns to work. They are, however, entitled to the normal short student holidays observed by the institutions attended, such as Christmas and New Year's, spring recess, and the short period between academic sessions.

FACULTY AND STAFF DEVELOPMENT PROGRAM

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

EDUCATIONAL LEAVE APPLICATION AND CONTRACT

To _____
(Institution)

I, _____, hereby apply for Educational Leave from _____, 19___, to _____, 19___, for educational purposes as follows: _____

_____

I have been a permanent full-time continuous employee of this institution since _____, 19___. My current salary is $_____ for ____ months of service per year.

1. Educational Leave without Stipend: I understand that I shall receive no stipend (salary), but if my educational leave involves postsecondary courses of study, I shall receive reimbursement of the expense of tuition and course related fees in the amount of $_____ for courses completed satisfactorily during my educational leave.

2. Educational Leave with Stipend: I understand that I shall receive a stipend consisting of a basic living allowance of $_____, payable in regular pay periods during my leave period, and if my educational leave involves postsecondary courses of study, I shall receive reimbursement of the expense of tuition and course related fees in the amount of $_____ for courses completed satisfactorily during my educational leave.

If granted educational leave, without stipend or with stipend, I hereby agree to abide by the regulations governing leave as set forth in the Educational Leave Program for the South Carolina Technical Education System and will fulfill my service obligation of _____ months based on the period of this leave, or if I terminate my employment or fail to complete my service obligation, I will repay within 30 calendar days the expenses of my educational leave incurred on my behalf by the institution in proportion to my unfilled service obligation unless I am released from my obligation for good cause which is limited to mean long-term disability from personal illness or injury, or illness within the immediate family (spouse or child) which makes it necessary for the family to relocate.

I understand that my employer, in approving my application for educational leave, agrees to fulfill employer obligations to me in accordance with the regulations set forth in the Educational Leave Program for the South Carolina Technical Education System.

APPROVED:

_____
(President/Director)

Date _____

SUBMITTED:

_____
(Applicant)

Date _____

APPENDIXES

APPENDIX A

PROGRAM PROPOSAL AND REPORT DOCUMENTS

FSD

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

NOTE:

FORMS FSD-1, FSD-2, FSD-3 ARE DESIGNED FOR THE PROGRAM PROPOSAL.
FORMS FSD-4, FSD-5, FSD-6 ARE DESIGNED FOR THE PROGRAM REPORT.

FORMS MAY BE PREPARED FOR IN-HOUSE OPERATION OF FSD PROGRAM.
Suggested are the following:
Application for FSD participation
(Form may carry sections for various activities with estimated costs)
Forms for reports to FSD coordinator
Records of participation in FSD activities
(For personnel files)
Reimbursement vouchers
(Breakdown of "permitted" expenses)
Etc. (Other forms as needed and/or desired)

FACULTY AND STAFF DEVELOPMENT
FOR
SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

GENERAL INSTRUCTIONS

It is important to observe the following general instructions in the preparation of the faculty and staff development (FSD) program proposal.

1. Guidelines

   Review "Guidelines and Procedures for Faculty and Staff Development" for the South Carolina Technical Education System.

2. Fiscal Procedures

   Review established general and fiscal procedures applicable to management and accounting of FSD funds and the submission of reports. Reference: FISCAL PROCEDURES MANAUAL, Volume I, Section 24.5.00.

3. Preparation of Proposal

   Prepare all proposal documents in triplicate. On or before July 15, of the fiscal year, submit two complete sets of documents to

   Coordinator of Faculty and Staff Development
   Division of Educational Services
   State Board for Technical and Comprehensive Education
   Robinson Building, Lexington Avenue
   West Columbia, South Carolina 29169

PROGRAM PROPOSAL FORMAT

The faculty and staff development (FSD) program proposal is composed of three major divisions as follows:

1. Narrative Description (Attach to FSD-1.)

The narrative description will cover the scope of the program in terms of need, priorities, objectives, procedures, and resources. Respond to the following elements:

(1) Priorities. Describe the priorities chosen and the rationale for selecting them.

(2) Objectives. Relate the activity objectives to the goals or purpose of the institution.

(3) Involvement in Planning. State the specific ways the members of faculty and staff were involved in planning.

(4) Participants. Give the general methods for enlisting participants, for dissemination of information, and for continuous involvement of faculty and staff.

The narrative description outlining the FSD program is an essential component of the proposal. The narrative should be a clear but a concise description of what is planned and why. Anyone should be able to read it and understand its full intent without misinterpretation or lingering questions. It sets the tone for the program and gives a sense of its significance, its relevance, and its credibility.

Since the narrative will briefly summarize the content of the program proposal, write it after the priorities have been selected and the activities described. Base the narrative summary on what is in the proposal, not on preliminary (and necessary) thoughts prior to designing the program. Good intentions, by themselves, are not enough.

The program proposal of necessity will be reviewed. The reviewer will fill in a "face sheet" as it is passed to the next level of review. The summary narrative will, therefore, be of service to all concerned. Far better that the reviewer use the narrative summary, than depend on his/her scan of all of the documents for the appraisal.

The program proposal format is offered as a guide, not a prescript.

2. FSD-2, Activities (DAUs)

The FSD-2 form provides description for either individual activities and/or unit activities (DAUs). The use and preparation of the activity application is of utmost importance and requires special consideration. (See "Operational Guidelines", page 15, and "Development Activity Titles (DAU)", page 39.)

3. FSD-3, Budget Summary

The FSD-3 form gives a FSD budget summary of estimated income from normal revenue sources and matching allocation of state funds and of estimated expenditures for the various activity applications. The summary lists activities by DAU titles, with total estimated expenditures for each (without breakdown into account classification). This budget summary is submitted with the annual program proposal and serves to govern FSD expenditures during the fiscal year.

4. Review and Evaluation

It is essential that the program proposal be reviewed and evaluated by the FSD coordinator and the FSD committee of the institution prior to submitting it to the coordinator of faculty and staff development of the State TEC System. Following the FSD proposal forms is a FSD program evaluation chart for institutional use (page 41).

FSD-1

FACULTY AND STAFF DEVELOPMENT PROGRAM

_____

INSTITUTION

July 1, 19___ to June 30, 19___

PROGRAM PROPOSAL

Attached is a narrative description outlining the FSD program, along with applications for specific activities and a budget summary (FSD-2 and FSD-3).

The institution agrees to comply with all South Carolina State laws and established policies and guidelines for Faculty and Staff Development for the South Carolina Technical Education System, including

Maintenance and auditing of all necessary personnel and fiscal records,
Submission of necessary evaluation and accomplishment reports,
Accountability for management and promotion.

APPROVED:

_____
President/Director

Date _____

SUBMITTED:

_____
FSD Coordinator

Date _____

Page _____ of _____ pages

(For State Office Use Only)

Comments/Action:

FSD-2

FACULTY AND STAFF DEVELOPMENT PROGRAM

_____ _____

INSTITUTION

APPLICATION FOR ACTIVITY APPROVAL

*Activity Title _____

Activity Date(s) _____ Activity Location _____

Number Participants _____ Name of Individual or Group _____

Specific Need: _____

_____

_____

Outcome Expected (objectives to be accomplished): _____

_____

_____

_____

_____

_____

ESTIMATED COST:

		Approval Requested	Other	Total
530100	Salaries	$	$	$
530202	Travel and Subsistence			
530214	Educational Consultants			
530307	Educational Supplies			
530411	Professional Memberships			
530470	Tuition Reimbursement			
530607	Educational Equipment			
Total Estimated Cost		$	$	$
Total Approved by FSD Coordinator, State Board		$		

Approved:

_____ _____

(Applicant's Signature, as appropriate) (Coordinator's Signature)

Date _____ Date _____

*(Please list each separate activity on separate activity sheet; attach narrative and specific documentation as appropriate. This form may be reproduced as needed.)

FSD-3

FACULTY AND STAFF DEVELOPMENT PROGRAM

_____
INSTITUTION

July 1, 19____ to June 30, 19____

BUDGET SUMMARY

ESTIMATED REVENUE

Allocation from Normal Revenue Sources	$ _____	
Supplemental Allocation from State Funds	_____	
Total		$ _____
Other Income - Gifts and Grants, Etc.	_____	
Total		_____
TOTAL ESTIMATED FSD REVENUE		$ _____

ESTIMATED EXPENDITURES

From Institutional and State FSD Funds

1. POSTSECONDARY EDUCATION	$ _____	
2. ON-CAMPUS SHORT COURSES	_____	
3. ON-CAMPUS WORKSHOPS, SEMINARS, ETC.	_____	
4. OFF-CAMPUS WORKSHOPS, SEMINARS, ETC.	_____	
5. PROFESSIONAL MEMBERSHIPS	_____	
6. EDUCATIONAL FIELD TRIPS	_____	
7. FSD RESOURCE CENTER	_____	
8. EDUCATIONAL LEAVE	_____	
FUNDS RESERVED FOR FUTURE ACTIVITIES	_____	
Total		$ _____

From Other FSD Income - Gifts and Grants, Etc.

*ACTIVITY _____		
Total		$ _____
TOTAL ESTIMATED EXPENDITURES		$ _____

*If more than one activity is involved, attach sheet listing each activity separately with estimated cost. Give total estimated cost of restricted sponsored activities on the above form.

DEVELOPMENT ACTIVITY TITLES (DAUs)

In-service development activities that are separate in action but are of the same kind or type can be classified in combination, forming a Development Activity Unit (DAU) under one general title - an overall strategy to actualize a general objective.

1. POSTSECONDARY EDUCATION
   Formal courses on campus or off campus, credit or noncredit, post-graduate or undergraduate, without tuition reimbursement or with tuition reimbursement in total or in part, pursued independently or as a part of a curriculum leading to a degree, diploma, or certificate.
   - Tuition Reimbursement (Account Number 530470)
   - Salaries Paid to Visting Instructors (Account Number 530100)

2. ON-CAMPUS SHORT COURSES
   Short courses to improve skills in instruction, planning, decision making, task execution, multi-media use, continuing education courses - with or without CEUs.
   - Salaries for Visiting Instructors (Account Number 530100)

3. ON-CAMPUS WORKSHOPS/SEMINARS/CONFERENCES/INSTITUTES
   Consortia with other institutions or intrainstitutional workshops, etc., on-campus, with or without consultants, with or without CEUs.
   - Educational Consultants - honoraria, travel and subsistence (Account Number 530214)
   - Educational Supplies (Account Number 530307)
   - Registration Fee (if applicable) (Account Number 530470)

4. OFF-CAMPUS WORKSHOPS/SEMINARS/CONFERENCES/INSTITUTES
   Consortia with other institutions or interinstitutional workshops, etc., off-campus, with or without consultants, with or without CEU.
   - Travel and Subsistence (Account Number 530202)
   - Registration Fee (Account Number 530470)

5. PROFESSIONAL SOCIETIES
   Membership dues and travel.
   - Membership Dues (Account Number 530411)
   - Travel and Subsistence (Account Number 530202)

6. EDUCATIONAL FIELD TRIPS
   Field trips to TEC and other institutions and to business and industry.
   - Travel and Subsistence (Account Number 530202)

7. FSD RESOURCE CENTER
   Educational supplies and equipment.
   - Educational Supplies (Account Number 530307)
   - Educational Equipment (Account Number 530607)

8. EDUCATIONAL LEAVE
   Postsecondary education or work with business or industry.
   - Salaries (Stipend) (Account Number 530100)

FSD ACCOUNTING - NUMBER, TITLE, EXPLANATION

530100 SALARIES

Salaries of visiting instructors for on-campus courses (not honoraria for consultants). This account covers also stipend (salary) for Educational Leave (substitute's salary not allowed from FSD funds.)

530202 TRAVEL AND SUBSISTENCE

Authorized institutional travel expense for individual or group for approved FSD activity and approved in conformity with state law governing mileage and per diem. (Travel expense for attendance at institutional association meetings or commuting expense for educational courses or for work experience is not covered under FSD funds.)

530214 EDUCATIONAL CONSULTANTS

Honoraria and other expenses for consultants - on-campus or off-campus consortia. Travel for consultants must be charged to this account (not 530202).

530307 EDUCATIONAL SUPPLIES

Educational supplies for upgrading station, Faculty and Staff Resource Center, for use exclusively for faculty and staff development, e.g., professional journals and books, professional education modules, and cassettes. This account covers also limited expense for duplicated materials for workshops/seminars/conferences/institutes, but not costs of personal books and supplies, entertainment, "coffee breaks", etc.

530411 PROFESSIONAL MEMBERSHIPS

Individual membership dues of professional societies (not civic nor political organizations). Authorized travel cost within limits set by the institution for attendance at meetings of professional societies charged to 530202.

530470 TUITION REIMBURSEMENT

Tuition for approved postsecondary courses, in total or in part, and course related fees, if any. (Reimbursement is not allowed for travel, cost of books and supplies, and incidental fees.) This account covers also registration application for off-campus workshops/seminars/conferences/institutes. Registration fees to cover incidental expenses for on-campus workshops, etc., whether in consortia or intrainstitutional, may be covered by this account. (Honoraria and travel expenses for consultants are charged to 530214.)

530607 EDUCATIONAL EQUIPMENT

Expense of educational equipment is restricted exclusively to purchases for FSD Resource Center. Equipment must be specialized equipment which is essential to faculty and staff development and must be used in an innovative application. It may not duplicate nor replace available equipment nor meet regular institutional equipment needs. Special justification must accompany application for purchase approval.

PROGRAM EVALUATION CRITERIA

EACH ITEM IS RATED FROM 0 to 10	RATING	COMMENTS:
1. Impact on meeting development needs of faculty and staff as outlined in program proposal.		
2. Adequacy of program design in covering priorities stated in program proposal.		
3. Adequacy of proposed activities to meet personnel needs including needs of undereducated and undertrained.		
4. Adequacy of the proposal in communicating development needs, activities objectives, and activities procedures.		
5. Relevance of activities to stated FSD objectives. Is it clear why each particular activity was chosen?		
6. Reasonableness of costs in terms of expected outcomes, impact, use of results, importance of activity.		
7. Adequacy of local allocation of funds to meet the faculty and staff development needs of personnel.		
8. Adequacy of FSD resource personnel: instructors, consultants, other resource persons to carry out the activities.		
9. Adequacy of criteria and procedures for process and/or accomplishment evaluation.		
10. Relevance of total program to TEC System's philosophy and stated purposes.		
TOTAL POINTS POSSIBLE = 100	Total	

Recommendation: Approve ___ Disapprove ___ Defer ___ Revise ___

Comments:

PROGRAM REPORTS

The annual FSD program report is composed of three major divisions, utilizing three forms.

1. FSD-4, Activity Evaluation and Status Report

A separate report for each approved activity application (FSD-2) must be made. The FSD-4 should be completed at the time of completion of an activity and held for inclusion in the annual FSD report as documentation for FSD-5 and FSD-6. This report consists of two parts.

(1) Funds Data. Each application for activity approval (FSD-2) includes an estimate of expenditures for the activity; each evaluation and status report (FSD-4) must give the actual cost of the activity. The compilation of data from individual activity reports will give the data for a DAU report (FSD-4). This data will be reflected in expenditures recorded in the fiscal budget summary (FSD-5).

(2) Activity Status and Evaluation. The status and evaluation report provides for a detailed institutional report of status and evaluation of each activity. An adequate narrative must be attached to the FSD-4 report, giving the institutional evaluation of the activity. The narrative should document briefly but adequately the results/outcome of the activity. This report will be reflected in the annual institutional evaluation of activities (FSD-6).

2. FSD-5, Year-end Fiscal Budget Summary

This document provides breakdown exhibit of funding sources (revenues allocated and committed) and expenditures made for all activities of the fiscal year ended on June 30. (See FISCAL PROCEDURES MANAUL, Volume I, Section 24.5.00.)

All expenditures reflected under FSD-5 column designated "Approved (FSD-2)" must be consistent with approved line items on the Application for Activity Approval (FSD-2) and the actual expenditures reported on the Evaluation and Status Report (FSD-4). The FSD-5 carries DAU titles with costs for each listed by account number.

Restricted-Sponsored Revenue should be disclosed to the extent expended during the report period. This report will reflect funds budgeted for restricted activities described in Application for Activity Approval (FSD-2).

3. FSD-6, Annual Institutional Evaluation of Activities

This report provides a summary exhibit of each and all activities of the FSD program for the fiscal year. Provided is a "Key for Institutional Evaluation of Activities".

One copy each of a FSD-4 for each DAU, a copy of the FSD-5, and a copy of the FSD-6 comprise the annual report of the institution. This report is made to the state FSD coordinator on or before August 15, following the end of the fiscal year.

The coordinator of faculty and staff development for the TEC system will prepare an annual report, with exhibit by institution. The institutional reports (FSD-6) will provide the information for this report.

FSD-4

FACULTY AND STAFF DEVELOPMENT PROGRAM

_____
INSTITUTION
July 1, 19___ to June 30, 19___

EVALUATION AND STATUS REPORT Report Date _____

Evaluator (Name and Title) _____

Activity Title _____

Activity Date(s) _____ Activity Location _____

Number Participants ____ Name of Individual or Group _____

ACTUAL COST:

		Actual within Approved (FSD2)	Other	Total
530100	Salaries	$	$	$
530202	Travel and Subsistence			
530214	Educational Consultants			
530307	Educational Supplies			
530411	Professional Memberships			
530470	Tuition Reimbursement			
530607	Educational Equipment			
Total Actual Cost		$	$	$
Total Approved (FSD2)		$		
Unexpended Balance (This Activity) (Deficit or surplus)		$		

1. Activity Status (Check one item)
   - _____ Activity completed
   - _____ Activity not completed; will be continued
   - _____ Activity never started
   - _____ Activity abandoned

2. Technique(s) of Evaluation (Check one or more items)
   - _____ Questionnaire
   - _____ Expert opinion
   - _____ Consensus of peers
   - _____ Other _____

3. Success of Activity (Check one item)
   - _____ Highly successful; achieved objective
   - _____ Moderately successful; worth time and money
   - _____ Cannot be adequately evaluated at this time
   - _____ Not successful; must revise approach if repeated

4. Value of Activity (Check one item)
   - _____ High value; highly recommended
   - _____ Marginal value; worth repeating with better participation
   - _____ Neutral value; must completely revise approach if repeated
   - _____ No value; not to be repeated

5. Narrative Evaluation (Attach narrative evaluation)
   From an evaluation standpoint, describe the outcome of the activity.

FSD-5

FACULTY AND STAFF DEVELOPMENT PROGRAM

_____
INSTITUTION

Fiscal Budget Statement & Request for Reimbursement
Year Ended June 30, ____

FUNDING SOURCE:

Institutional Funds		$ _____	
State Funds Faculty & Staff Development Allocation		_____	
Total Unrestricted			$ _____
Restricted-Sponsored Revenue			_____
Total Funds Provided			$ _____

EXPENDITURES:			Approved (FSD2)	Other	Total
1. POSTSECONDARY EDUCATION					
Tuition Reimbursement	(530470)	$ _____			
Salaries Paid to Visiting Instructors	(530100)	_____	$ _____	$ _____	$ _____
2. ON-CAMPUS SHORT COURSES					
Salaries Paid to Visting Instructors		(530100)	_____	_____	_____
3. ON-CAMPUS WORKSHOPS, SEMINARS, ETC.					
Consultants	(530214)	$ _____			
Supplies	(530307)	_____			
Registration	(530470)	_____	_____	_____	_____
4. OFF-CAMPUS WORKSHOPS, SEMINARS, ETC.					
Travel	(530202)	$ _____			
Registration	(530470)	_____	_____	_____	_____
5. PROFESSIONAL MEMBERSHIPS					
Dues	(530411)	$ _____			
Travel	(530202)	_____	_____	_____	_____
6. EDUCATIONAL FIELD TRIPS					
Travel		(530202)	_____	_____	_____
7. FSD RESOURCE CENTER					
Supplies	(530307)	$ _____			
Equipment	(530607)*	_____	_____	_____	_____
8. EDUCATIONAL LEAVE					
Stipend		(530100)	_____	_____	_____
Total Unrestricted FSD			$ _____	$ _____	$ _____
Restricted-Sponsored FSD			xxx	_____	_____
Total FSD Expenditures			$ _____	$ _____	$ _____
TOTAL BUDGET			$ _____	$ _____	$ _____

* $ _____ Paid by State Board Included.

I certify that this statement is correct and properly documented in the financial records of the institution, and hereby request reimbursement based on approved program expenditures provided within the State Funds Allocated for Faculty and Staff Development.

SIGNED _____ DATE _____
Institution President/Director

Relevant Excerpts from FISCAL PROCEDURES MANUAL, Vol. I

24.5.00 State Faculty and Staff Development Reimbursement

Collection of the State funded portion of the Faculty and Staff Development Program will be effected by filing of the Faculty and Staff Development Program Fiscal Budget Statement and Request for Reimbursement (FSD-5 Form). The reimbursement and financial statement will be executed on a cash-basis, with approved activity not paid by the institution at June 30 of the fiscal year deferred and applied to the program budget in the subsequent year's activity.

For the reimbursement claim to be acceptable, the following procedures must be followed:

(1) The FSD-5 must be completed as to all entries and filed directly to the State Board Finance Division no later than July 10, following the end of the fiscal year for which claim is made.

(2) The financial records of the institution must contain adequate external documentation supporting each disbursement of FSD funds. The documentation is not required as backup to be submitted with the claim; however, individual transaction documents are subject to request from the State Board for subsequent State Audit reference. The State Board Audit Program will also include an extensive test of documentation on the FSD Program. Specific documentation examples are referenced in Section 24.5.20.

(3) All expenditures reflected under the FSD-5 column designated "Approved (FSD2)" must be consistent with the approved line items on the Application for Activity Approval (FSD-2) and the actual reported on the Evaluation and Status Report (FSD-4).

(4) The approved activity actual cost will be reimbursed in accordance with the level of State Funding and any provisions for matching in effect for the fiscal period.

(5) The FSD-5 filed for reimbursement claim does not affect the filing required in the FSD final program report. (Final FSD program report consists of FSD-4, FSD-5, and FSD-6.)

24.5.10 The entries provided on the Fiscal Budget Statement and Request for Reimbursement (FSD-5) are as follows:

FUNDING SOURCE:

Institutional Funds - Total institutional funds applied to FSD purposes including matching required for the State Allocation.

State Funds Allocation - Special allocation indicated by the State Board for FSD. The State Funds FSD Allocation is to appear in the anticipated revenue of one of the "Other State Funds Revenue" accounts (102080 - 102100). The amount of claim is to be entered

State Funds Allocation - (continued)
as earned revenue at the time the claim is filed with the State Board.

Restricted-Sponsored Revenue - is to be disclosed only to the extent expended during the report period.

EXPENDITURES:
The account numbers delineated on the FSD-5 Form accommodate only the line items that may be added to permit disclosure in the "Other" column of all FSD expenditures. The activity categories (1) thru (8) correlate to the individual activities approved on the FSD-2 Form and reported on FSD-4 Form.

The FSD-5 Form entries normally will not be available as a direct transfer from budget subsidiary records. The entries are small volume and may be derived by analysis from the records. Automated/ Manual subsidiary records may be established at the discretion of the institution.

24.5.20 External Documentation Requirements

Object Code 100 - Normal payroll file data including necessary approval documents referencing Educational Leave and Dual Employment Forms (outside instructors).

202 - Individual, signed travel reimbursement forms.

214 - Invoices rendered by the consultant to the institution delineating time and other charges and description of services performed.

307 - Vendor invoices supported by evidence of required institution puchasing policies (Section 18).

411 - Copy of membership application form.

470 - Copy of paid recipt from institution of higher learning for tuition paid by employees and regis ration application for conferences/workshops/institutes/seminars.

607 - Vendor invoices, if paid by institution, FSD reference on requisition if State paid. Footnote the FSD-5 for any State Paid amount included in the report.

24.5.30 Form Example (FSD-5) (Fiscal Budget Statement & Request for Reimbursement) (See page 44 FSD MANUAL.)

FSD-6

FACULTY AND STAFF DEVELOPMENT PROGRAM

_____
INSTITUTION

July 1, 19____ to June 30, 19____

ANNUAL INSTITUTIONAL EVALUATION OF ACTIVITIES

Title and Objectives of Activity (DAU)	Number of Employees	Status of Activity: C, IP, NC	Success of Activity: Rate 3 to 0	Value of Activity: Rate 3 to 0	Total Cost To-Date
POSTSECONDARY EDUCATION Formal courses on campus or off campus, credit or noncredit, postgraduate or undergraduate	____	____	____	____	$_____
ON-CAMPUS SHORT COURSES Short courses to improve skills in instruction, continuing education courses	____	____	____	____	_____
ON-CAMPUS WORKSHOP/SEMINARS/CONFERENCES/INSTITUTES Consortia or intrainstitutional workshops, etc.	____	____	____	____	_____
OFF-CAMPUS WORKSHOPS/SEMINARS/CONFERENCES/INSTITUTES Consortia or interinstitutional workshops, etc.	____	____	____	____	_____
PROFESSIONAL SOCIETIES Memberships dues and travel	____	____	____	____	_____
EDUCATIONAL FIELD TRIPS Field trips to TEC and other institutions and to business and industry	____	____	____	____	_____
FSD RESOURCE CENTER Educational supplies and equipment	____	____	____	____	_____
EDUCATIONAL LEAVE Postsecondary education or work with business or industry	____	____	____	____	_____
TOTAL	____			TOTAL COST	$_____

(Note: See Key for Institutional Evaluation of Activities)

FACULTY AND STAFF DEVELOPMENT PROGRAM

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

KEY FOR INSTITUTIONAL EVALUATION OF ACTIVITIES

(To be used with Exhibit of Annual Program Summary)

Status of Reported Activity (Check the status activity at date of report.)

C	Activity has been completed. (Completed - C)
IP	Activity is in progress and will be continued. (In Progress - IP)
NC	Activity never started or started and abandoned. (Not Completed - NC)

Success of Reported Activity (Check item which most accurately describes the institutional evaluation.)

3	Achieved objective; desired outcome essentially realized; considered highly successful by participants.
2	Considered moderately successful; worth time and money; outcome considered worthwhile by participants.
1	Cannot be evaluated at this time - activity still in progress; operating according to plan.
0	Not successful; was planned but abandoned; approach must be revised if the activity is to be repeated.

Value of Activity (Check item which most accurately describes the institutional evaluation.)

3	Very valuable; activity highly recommended for FSD; well worth cost of time and money.
2	Marginal value, yet worth repeating with better direction and participation; worth the cost of time and money.
1	Neutral value - must completely revise approach if repeated; not worth the cost of time and money.
0	Not recommended; benefits disproportinate to costs; not be repeated.

APPENDIX B

FACULTY AND STAFF DEVELOPMENT DEFINITIONS

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

NOTE:
THESE DEFINITIONS ARE TO BE APPLICABLE TO THE TERMS WHEN USED IN THE FSD PROGRAM.

FACULTY AND STAFF DEVELOPMENT DEFINITIONS

FOR

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

The following definitions may be helpful when planning, implementing, conducting, and evaluating faculty and staff development programs.

ACCOUNTABILITY: Responsibility for results of an activity, procedure, process, or program.

ACTIVITY: A specific course of action to achieve a measurable outcome, to be carried out within a given time span, under specific conditions; activity connotes "specificity" of action and results. (Activity is the term to be used in FSD, chosen in preference to other terms that may be considered more or less synonymous.)

ACTIVITY UNIT: A number of FSD activities separate in action but of the same kind or type, and united under a common objective which is indicated by classification title. (See Development Activity Unit.)

ADMINISTRATION: The process, practices, and rationalized techniques of decision-making, and actions employed in achieving the purposes, goals, and objectives of the FSD program.

ALLOCATION. Funding provided a program, institution, or system for a specific purpose.

BRIEFINGS: Planned communication programs to orient specific target groups.

BUZZ SESSIONS: Problem solving technique involving small group discussion to maximize individual participation. Sometimes called "Rap Sessions".

CALENDAR FOR PLANS AND REPORTS: Deadlines for plans and reports due in the central office of the State Board for Technical and Comprehensive Education.

COMMUNITY INVOLVEMENT: Active participation by members of the community - business, industry, agencies, schools - in the planning and/or implementing a program.

CONFERENCE: A meeting for consultation, discussion, or an interchange of opinions and information whether of individuals or groups.

CONTINGENCY FUNDS: Budgeted funds designated for unscheduled activities and/or expenses, but restricted to expenditures on activities commensurate with the approved FSD plan.

COORDINATOR: An educator - administrator or instructor - responsible for the harmonious administration and operation of a program; one who is skilled in decision-making in processes or activities requiring leadership in interpersonal behaviors.

COURSE: An educational unit at the high school, post-secondary or college or university level, consisting of a series of instruction periods dealing with a particular subject; sometimes used as synonymous with curriculum and program to indicate a complete, progressive series of studies necessary for graduation.

CURRICULUM: An organized group of courses designed to meet an educational objective; sometimes used synonymously with program and course to indicate a complete, progressive series of studies necessary for graduation.

DESIGN FOR FSD PROGRAM: Arrangement of components of the program; description of objectives and activities to achieve them, organized for communication and promotion.

DEVELOPMENT: The actualization of the potential; advancement and enhancement of knowledge, skills, and effectiveness.

(1) Development Program: Combination of planned activities to achieve the objectives of development; goals, objectives, and activities of the organization with the procedure to accomplish them.

(2) Personnel Development/Improvement: Involves pre-service and/or in-service educational and/or training activities to prepare or improve personnel in their roles and responsibilities in endeavors which are educational or educationally related.

(3) Development Activity Unit: Interrelated development activities which may be classified or categorized under one title (DAU). (See Activity Unit.)

DECISION MAKING: Using skills necessary in understanding cause and effect relationships and in applying data or information to the solution of a problem or to the determination of a course of action.

ELIGIBILITY: Qualifications necessary for participation in activity/activities under FSD program; qualifications vary for the various activities.

EXPENDITURES RESTRICTIONS: FSD funds may not be used for expenditures for institutional projects such as research, self-study, planning and evaluation of new educational programs; or for salaries, salary increases, and fringe benefits; or for any normal expenses common to operation of any college, e.g. attendance at meetings which are associational and institutional rather than instructional and individual.

FIELD EXPERIENCE: Work activity acquired by faculty and staff in a practical situation usually off campus in business or industry; sometimes referred to as "life experience".

GOAL: Nonmeasurable end desired and sought through means to that end; aim accomplished by anticipation and expectation derived by ratiocination.

GUIDELINES: Statement which identified a procedure and offers required or optional methodology and parameters for performing that procedure.

IN-SERVICE EDUCATION: Activities designed to promote personnel development and improvement of faculty and staff while on-the-job or employed.

LEADERSHIP: Interpersonal behaviors which cause a group to progress satisfactorily in achieving its goals and objectives.

LEARNING OUTCOMES: Specific changes in learner knowledge, skills, or competencies attributed to a teaching strategy, learning activity, or directed experience.

LEAVE: Full- or part-time off from work or duties.

(1) Educational Leave: Leave from work or duties to participate in courses of study or in work experience.

(2) Educational Leave without Stipend: Full-time or part-time leave in a nonpay status; such leave is approved in advance by the employee's supervisor, institution's head, area commission, agency's head, agency, State Budget and Control Board, as appropriate.

(3) Educational Leave with Stipend: Full-time or part-time leave with stipend; such leave is approved in advance by the employee's supervisor, institution's head, area commission, agency's head, agency, State Budget and Control Board, as appropriate.

OBJECTIVE: The measurable outcome desired and striven for within a given time span, under specific conditions; an objective may be described as a desired result or condition, or as the establishment of a desired process or activity.

OFF DUTY FSD ACTIVITY: FSD activity carried on by an employee without loss of employee's work time, productivity, or efficiency in his/her service area.

ORIENTATION: Planned communication programs to orient target groups; use of interpretation and familiarization to achieve adjustment or cooperation.

PERFORMANCE OBJECTIVES: Observable behaviors which a learner should be capable of performing at conclusion of a learning activity which includes: terminal performance; category of learning, e.g., cognitive, affective psychomotor; conditions under which performance is carried out; and criterion of acceptable performance.

POLICY: Regulations set forth through statute or action of a governing body to establish principles basic to a chosen course of action to fulfill a mission or purpose.

PROCEDURE: Operational unit established for implementation of policy; a particular course of action or way of accomplishing some objective.

PROCESS EVALUATION: Provides periodic feedback to persons responsible for conducting programs or activities to: (1) Detect and predict defects in the procedural design or in its implementation stages, (2) provide information for programmed decisions, and (3) maintain a record of procedure or action as it occurred.

PROFESSIONAL EDUCATOR: One concerned with both the theoretical and practical aspects of human endeavor in the field of education, with the application in that endeavor of special knowledge and skills acquired by formal education or experience or both.

PROGRAM DEVELOPMENT: (To be distinguished from "Development Program" and "Personnel Development") Refers to improvement by addition of innovate elements to increase effectiveness of institutional services, viz., administrative and student personnel services, clerical, janitorial, and maintenance services. The focus is upon the institution and not upon the individual employer.

PROPOSAL (FSD): The organized description of the activities and budget for faculty and staff development submitted for consideration.

SEMINAR: (1) A type of meeting in which participants are studying under a leader, each participant being involved in discussions, exchanging of ideas, and reports; (2) a type of formal education in which students work under leadership of an instructor in research, discussions, and reports with the expectation of receiving academic credit.

SIMULATION: A technique which attempts to duplicate a real-life phenomena under experimental conditions.

STATUS REPORT: Report of process and progress evaluation of an activity or program given at some point in time for the purposes of decision making or evaluative judgment.

STIPEND: Funds granted for an approved activity, including, as applicable, cost of tuition and course related fees, basic living allowance (full- or part-pay as determined) to provide support for an individual in an approved educational activity.

STIPEND RESTRICTIONS: If a program of study for which a stipend is awarded is offered by one or more accredited institutions of higher learning within the State of South Carolina and the recipient is able to gain admission to one of these, the stipend shall be used in said institution. If not, the stipend may be used at any accredited institution to which the recipient is able to gain admission.

STRATEGY: A plan of action to be carried out to achieve an objective; FSD activity.

SUPERVISION: A phase of administration focusing on the accomplishment of an objective.

TECHNICAL EDUCATION: Training process in preparing technicians for employment in occupations requiring specific knowledge and skills, scientific and mathematical application, as distinguished from general education.

TECHNOLOGY: The science or study of the practical or industrial arts; a technologist is one who makes or directs application of the knowledge and skills of the science.

TRAINING: The development of a capability to accomplish a repetitious, step-by-step, task; instruction to make proficient or qualified by skills for a specific task in vocational-technical occupations.

UPDATING/UPGRADING: Supplemental or extension training or experience for the purpose of increasing knowledge, skills, or proficiency in a specific subject field, technology, or methodology.

UPGRADING STATION: Location for upgrading learning activity such as work experience in business or industry or formal study in institutions of higher education.

VOCATIONAL EDUCATION: Education and training for employment in semi-skilled, skilled, and some technical occupation; often hyphenated with technical, i.e., vocational-technical education.

APPENDIX C

CHECK LIST PROFESSIONAL NEEDS

SOUTH CAROLINA TECHNICAL EDUCATION SYSTEM

NOTE:

THIS FORM MAY BE USED AS AN AID IN INSTITUTIONAL NEEDS ASSESSMENT OR FOR DISTRIBUTION TO FACULTY AND STAFF FOR SELF-EVALUATION.

THE FORM MAY BE REPRODUCED AS NEEDED, OR IT MAY BE MODIFIED FOR INSTITUTIONAL USE.

CHECK LIST TO ASCERTAIN PERCEPTIONS OF GENERAL AND SPECIAL EDUCATIONAL NEEDS

This instrument may be used in four ways: (1) Respond to all numbered items; (2) Respond only to broad lettered items A-K; (3) Scan and respond to five numbered items which represent greatest need; (4) Use in a counseling situation.

Listed below are skills and competencies needed by individuals. Please add skills or competencies that you feel are important. Please indicate the degree you need to acquire each competency. Also check the urgency or immediacy for your obtaining or upgrading the competency.

Degree of Need	When Needed
1 - Some	1 - Now (within 1 year)
2 - Much	2 - 2-3 years
3 - Critical	3 - Long-range

Topic, Skill or Competency Areas	Degree of Needs			When Needed		
	1	2	3	1	2	3
A. Program Planning, Development, and Evaluation						
1. Occupational education needs surveys						
2. Working with advisory committees						
3. Occupational task analysis/competencies/ requirements in curriculum development						
4. Developing objectives for courses						
5. Developing a series of courses						
6. Evaluating vocational programs, validation						
7. Other (specify)						
B. Instructional Planning						
8. Individualizing instruction						
9. Developing course units						
10. Developing lesson plans						
11. Developing audio-visual materials						
12. Selecting instructional resources						
13. Developing learning activities						
14. Other (specify)						
C. Instructional Execution						
15. Teacher-centered methods of presentation						
16. Managing student-centered learning activities						
17. Using multi-media techniques						
18. Incorporating community resources						
19. Teaching disadvantaged/handicapped						
20. Other (specify)						
D. Instruction Evaluation						
21. Self-evaluation of instruction						
22. Student evaluation of instruction						
23. Appraising student performance						
24. Student performance criteria						
25. Student self-evaluation of progress						
26. Tests and rating scales						
27. Other (specify)						

	Degree of Needs			When Needed		
	1	2	3	1	2	3
E. **Management**						
28. Facilities/equipment/supplies						
29. Preparing budgets						
30. Filing instructional materials & records						
31. Managing student learning activities						
32. Providing for safety in classroom/lab						
33. Other (specify)						
F. Guidance						
34. Counseling with students						
35. Working with counselors/teachers						
36. Other (specify)						
G. School - Community Relations						
37. Publicizing vocational ed. program						
38. Working with community agencies & groups						
39. Working with business and industry						
40. Working with State officials						
41. Other (specify)						
H. Student Organizations						
42. Working with student organizations						
43. Other (specify)						
I. Coordination						
44. School-community voc.-ed. programs						
45. Other (specify)						
J. Professional Role and Development						
46. Updating my subject matter knowledge and understanding						
47. Updating my occupational skills and work experience						
48. Updating my philosophy of vocational, technical, and adult education						
49. Other (specify)						
K. Miscellaneous						
50. Other (specify)						
51. Other (specify)						

Comments/Suggestions: _____

_____

_____

_____

Name _____

(Please see instructions)

UNIVERSITY OF CALIF.
LOS ANGELES
JUL 5 1977
CLEARINGHOUSE FOR
JUNIOR COLLEGES